

# Opportunities for Composites in the European Automotive Market 2009-2014, November 2009

<https://marketpublishers.com/r/O1AE1C18429EN.html>

Date: November 2009

Pages: 169

Price: US\$ 7,000.00 (Single User License)

ID: O1AE1C18429EN

## Abstracts

Composites are becoming the material of choice for replacing traditional materials such as steel, aluminum and engineering plastics in European automotive industry. Compared to traditional materials, composites have higher strength-to-weight ratios, chemical and heat impact resistance, offer greater design flexibility. The future of the composite materials in European automotive industry market compared to competing materials looks good. Also, Europe has come up as leading region using advanced high performance carbon-epoxy composites in racing and luxury cars, though at a nascent stage. However, demand for composites dropped significantly during 2008 and expected to drop in 2009 as overall automotive market dipped in 2008 and expected to drop in 2009. According to Lucintel's new report "Opportunities for Composites in European Automotive Market 2009–2014: Trends, Forecast, and Opportunity Analysis", composites materials market is expected to reach \$1824.9 million by 2014. Composites consumption in automotive applications such as air intake manifolds, front end carriers, interior headliners, pickup box, switches are expected to grow above 4% CAGR during the in the next 5 years.

Producers, focusing on innovations and cost leadership will win most of the volume growth. Automotive OEMs are looking for new ways to reduce vehicle weight, further increasing fuel economy and thus increasing environmental performance. By developing new materials to meet the demanding application requirements with a focus on weight and cost reduction, composites materials suppliers will gain more market share during the next six years.

This unique 169 page report from Lucintel provides all the valuable information and tools that you may need in operating your business successfully in the European Automotive composites market. In today's global economy, you need every advantage

that you can find to keep you ahead in your business. Learn about current trends, identify key players, and explore the directions that the European Automotive composites market is heading for.

**Some of the features of this market report are:**

Market size estimates in terms of value (\$) and volume (mill lbs) materials consumption in European Automotive industry.

Porters Five Force Analysis for European Automotive Composites market in terms of Supplier Power, Buyer Power, Barriers to Entry, Threat of Substitution and Rivalry.

Growth trends for last 5 years and forecasts for next 5 years in terms of dollar shipment and lbs consumed in total European composites market and also for various application segments such as Air intake manifold, connectors and front end carriers.

Trends and forecast for various raw materials such as SFT, LFRT, LWRT, GMT, CFRT, SMC, and BMC; Resins such as Polypropylene, Polyester etc.

Market penetration of competing materials in various applications such as headliner, intake manifolds, front end carrier, valve covers, etc.

Over 95 figures/charts and 23 tables in this 169-page market report to help you make more informed business decisions.

Brief descriptions on major industry leaders

## Contents

### 1. EXECUTIVE SUMMARY

### 2. EUROPEAN AUTOMOTIVE COMPOSITES MARKET

2.1 Market Overview

2.2 Challenges

2.3 Key Growth Drivers

### 3. APPLICATIONS

#### 3.1 Interior

3.1.1 Interior Headliners

3.1.2 Load Floor

3.1.3 Instrument Panel

3.1.4 Door Module

3.1.5 Air Bag Housing

#### 3.2 Exterior

3.2.1 Underbody Shields

3.2.2 Bumper Beam

3.2.3 Front End Module

3.2.4 Running Boards

3.2.5 Door Handles

3.2.6 Deck Lid

3.2.7 Hoods

3.2.8 Headlamp Reflectors

3.2.9 Fenders

3.2.10 Pickup box

#### 3.3 Under-the-hood

3.3.1 Air Intake Manifold

3.3.2 Air Cleaner Housing

3.3.3 Air Duct

3.3.4 Air Resonator

3.3.5 Engine Cover

3.3.6 Rocker Covers

3.3.7 Heating and Cooling System

3.3.8 Connectors

## **4. EUROPEAN AUTOMOTIVE COMPOSITES MARKET ANALYSIS**

- 4.1 Overview
- 4.2 European Automotive Industry
- 4.3 Automotive Composites Market by Resin Group
- 4.4 Automotive Composites Market by type of Material
- 4.5 Automotive Composites Market by type of Base Resin
- 4.6 Automotive Composites Market by Application

## **5. MATERIALS AND MANUFACTURING PROCESS**

- 5.1 Thermoplastic Composites
  - 5.1.1 SFT
  - 5.1.2 LFRT
  - 5.1.3 D-LFT
  - 5.1.4 GMT
  - 5.1.5 LWRT
  - 5.1.6 CFRT
- 5.2 Thermoset Composites
  - 5.2.1 SMC
  - 5.2.2 BMC
  - 5.2.3 Polyurethane Composites
- 5.3 Processes
  - 5.3.1 Injection Molding
  - 5.3.2 Compression Molding
  - 5.3.3 Others
  - 5.3.4 Automotive Composites Market by Process

## **6. COMPETITIVE ANALYSIS**

- 6.1 Overview
- 6.2 Competitive Analysis by Application
  - 6.2.1 Interior Headliners
  - 6.2.2 Air Intake Manifolds
  - 6.2.3 Front End Carriers
  - 6.2.4 Engine Valve Covers
  - 6.2.5 Bumper Beams
  - 6.2.6 Light Truck Pickup Box/Bed
  - 6.2.7 Headlamp Reflectors

- 6.2.8 Truck Cab Roofs
- 6.2.9 Automotive Connectors
- 6.2.10 Tailgates

## **7. TRENDS – EUROPEAN COMPOSITES MARKET**

- 7.1 Overview
- 7.2 Trends – European Automotive Industry
  - 7.2.1 Trends - Light Vehicle Sales
  - 7.2.2 Trends - Light Vehicle Production
- 7.3 Trends - Automotive Composites Market by Resin Group
- 7.4 Trends - Automotive Composites Market by type of Material
- 7.5 Trends - Automotive Composites Market by type of Resin
- 7.6 Trends - Automotive Composites Market by Application

## **8. FORECAST – EUROPEAN AUTOMOTIVE COMPOSITES MARKET**

- 8.1 Overview
- 8.2 Forecast – European Automotive Industry
- 8.3 Forecast - Automotive Composites Market by Resin Group
- 8.4 Forecast - Automotive Composites Market by type of Material
- 8.5 Forecast - Automotive Composites Market by type of Resin
- 8.6 Forecast - Automotive Composites Market by Application

## **9. MATERIALS SUPPLIERS**

- 9.1 Thermoplastic Composites
  - 9.1.1 BASF
  - 9.1.2 DUPONT
  - 9.1.3 SABIC Innovative Plastics
  - 9.1.4 Ticona
  - 9.1.5 RTP
- 9.2 Thermoset Composites
  - 9.2.1 DSM Composite Resin
  - 9.2.2 Menzolit GmbH
  - 9.2.3 Lorenz GmbH
  - 9.2.4 TETRA-DUR GmbH
  - 9.2.5 MITRAS
  - 9.2.6 Ranger



## List Of Figures

### LIST OF FIGURES

#### CHAPTER 1

Fig. 1.1 Key Growth Drivers and Market Demand Restraints

Fig. 1.2: Porter's Five Forces model for the European Automotive Composites Market

#### CHAPTER 2

Fig. 2.1 CARS 21 integrated approach to reduce road transport CO2 emissions

Fig. 2.2 Market drivers and impact analysis

#### CHAPTER 3

Fig. 3.1 Interior Headliner

Fig. 3.2 Load Floor and Trunk Separator

Fig. 3.3 Instrument Panel

Fig. 3.4 Door Module

Fig. 3.5 Air Bag Housing

Fig. 3.6 Automotive Underbody System

Fig. 3.7 Bumper Beam

Fig. 3.8 Front End Carrier (Including Bumper Beam and Other Accessories)

Fig. 3.9 Automotive Running Board

Fig. 3.10 Door Handle

Fig. 3.11 Deck Lid

Fig. 3.12 Carbon fiber hood of Audi A4

Fig. 3.13 Headlamp Reflectors

Fig. 3.14 BMW E46 Fenders

Fig. 3.15 Composite Pickup box/bed

Fig. 3.16 Air Intake Manifold

Fig. 3.17 Air Cleaner Housing

Fig. 3.18 Air Duct

Fig. 3.19 Air Cleaner Housing

Fig. 3.20 Engine Cover

Fig. 3.21 Air Cleaner Housing

Fig. 3.22 Heating and Cooling Systems

Fig. 3.23 Automotive Connectors

## CHAPTER 4

- Fig. 4.1 European Automotive Materials in 2008
- Fig. 4.2 Market Share of Top Car Manufacturers in Europe (by Car Sales) in 2008
- Fig. 4.3 Top 10 Car Manufacturers in Europe: Sales in 2008 & % Change (2007-08)
- Fig. 4.4 European Automotive Composites (mill lbs) by Resin Group
- Fig. 4.5 European Automotive Composites (\$ mill) by Resin Group
- Fig. 4.6 European Automotive Composites (mill lbs) by Material in 2008
- Fig. 4.7 European Automotive Composites (\$ mill) by Material in 2008
- Fig. 4.8 European Automotive Composites (mill lbs) by type of Base Resin in 2008
- Fig. 4.9 European Automotive Composites (\$ mill) by type of Base Resin in 2008
- Fig. 4.10 European Automotive Composites (mill lbs) by Application Group in 2008
- Fig. 4.11 European Automotive Composites (\$ mill) by Application in 2008

## CHAPTER 5

- Fig. 5.1 Composite Material/Processes used for Automotive Applications
- Fig. 5.2 Composite Material Suppliers/ Molders Automotive Applications
- Fig. 5.3 Classification Automotive Applications and Composites usages
- Fig. 5.4 Typical Injection Molding Equipment
- Fig. 5.5 Typical Compression Molding Equipment
- Fig. 5.6 Typical Spray-up Equipment
- Fig. 5.7 European Automotive Composites (mill lbs) by Process in 2008
- Fig. 5.8 European Automotive Composites (\$ mill) by Process in 2008
- Fig. 5.9 Applicability of Various Composite Manufacturing Technologies, by Annual Production Volume and Part Weight

## CHAPTER 6

- Fig. 6.1 Environmental Impact Vs Cost – SMC, Aluminum, and Steel (source: Menzolit)
- Fig. 6.2 European Automotive Materials 2008
- Fig. 6.2 VW Beetle Front Lip Spoiler (PU RIM)
- Fig. 6.3 Audi TT Rear Spoiler (PU RIM)
- Fig. 6.4 BMW E92 3-Series Side Skirts (ABS Plastic)
- Fig. 6.5 European Automotive Materials 2008
- Fig. 6.6 European Automotive Composites (mill lbs) by Application in 2008
- Fig. 6.7 European Auto Interior Headliner Market in 2008
- Fig. 6.8 European Auto Air Intake Manifold Market in 2008



- Fig. 6.9 European Auto Front End Carriers Market in 2008
- Fig. 6.10 European Auto Engine Valve Covers Market in 2008
- Fig. 6.11 European Auto Bumper Beam Market in 2008
- Fig. 6.12 European Light Truck Pickup Box/Bed Market in 2008
- Fig. 6.13 European Auto Headlamp Reflector Market in 2008
- Fig. 6.14 European Truck Cab Roof Market in 2008
- Fig. 6.15 European Auto Connectors Market in 2008
- Fig. 6.16 Cost comparison of SMC versus sheet metal on Tailgates (source: Menzolit)
- Fig. 6.17 Cost Comparison – SMC, Sheet Metal, and RTM on Tailgates (source: Menzolit)
- Fig. 6.18 Cost Comparison – SMC, and Sheet Metal (source: Menzolit)

## **CHAPTER 7**

- Fig. 7.1 Trend – European Automotive Composites 2003-2008
- Fig. 7.2 Trend – European Vehicle Production & GDP Growth Rate (2003-2008)
- Fig. 7.3 Annual Cars Sales Growth Rates by Big 6 OEMs 2008
- Fig. 7.4 European Auto Production Trend 2003-2008
- Fig. 7.5 Trend European Light Vehicle Production by OEM 2007-2008
- Fig. 7.6 Light Commercial Vehicle Production Quarterly Trend 2007-2008
- Fig. 7.7 Passenger Cars Production Quarterly Trend 2007-2008
- Fig. 7.8 Trend – European Automotive Composites (mill lbs) by Resin Group 2003-2008
- Fig. 7.9 Trend – European Automotive Composites (\$ mill) by Resin Group 2003-2008
- Fig. 7.10 Trend – European Automotive Composites (mill lbs) by Material 2003-2008
- Fig. 7.11 Trend – European Automotive Composites (\$ mill) by Material 2003-2008
- Fig. 7.12 Trend – European Automotive Composites (mill lbs) by type of Resin 2003-2008
- Fig. 7.13 Trend – European Automotive Composites (\$ mill) by type of Resin 2003-2008
- Fig. 7.14 Trend – European Automotive Composites (mill lbs) by Application 2003-2008
- Fig. 7.15 Trend – European Automotive Composites (\$ mill) by Application 2003-2008

## **CHAPTER 8**

- Fig. 8.1 Composite Material Consumption Trend and Forecast (lb/vehicle) in European Automotive Industry
- Fig. 8.2 European Car Sales by Consumer Segment 2008
- Fig. 8.3 Forecast – European Automotive Composites (mill lbs) by Resin Group 2009-2014
- Fig. 8.4 Forecast – European Automotive Composites (\$ mill) by Resin Group

2009-2014

Fig. 8.5 Composite Materials Life Cycle Analysis

Fig. 8.6 Competitive Analysis – European Auto Composite Materials

Fig. 8.7 Forecast – European Automotive Composites (mill lbs) by Material 2009-2014

Fig. 8.8 Forecast – European Automotive Composites (\$ mill) by Material 2009-2014

Fig. 8.9 Forecast – European Automotive Composites Market (mill lbs) by type of Resin 2009 - 2014

Fig. 8.10 Forecast – European Automotive Composites Market (\$ mill) by type of Resin 2009 - 2014

Fig. 8.11 2008 Market Penetration, 2009-2014 Forecast Growth Rates and 2008 Market Size by Major Application

Fig. 8.12 Forecast- European Automotive Composite (mill lbs) by Application 2009-2014

Fig. 8.13 Forecast- European Automotive Composite (\$ mill) by Application 2009-2014

## **CHAPTER 9**

Fig. 9.1 Renault Megane CC & VW EOS: SMC Deck lids (Menzolit)

## I would like to order

Product name: Opportunities for Composites in the European Automotive Market 2009-2014, November 2009

Product link: <https://marketpublishers.com/r/O1AE1C18429EN.html>

Price: US\$ 7,000.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/O1AE1C18429EN.html>